

**SFA Modernization Partner Program
Monthly Management Services Summary
for the month of August 2000**

September 10, 2000

Table of Contents

INTRODUCTION.....	3
PROGRAM OVERVIEW	4
VALUE POINTS	8
Master Deliverables Schedule.....	10
Summary Of Program Risks & Issues.....	11
Program Risks.....	11
Program Issues.....	12
KEY ACCOMPLISHMENTS THIS MONTH AND PLANS FOR NEXT MONTH	13
CFO.....	13
FMS Oracle Financials.....	13
CIO	14
Financial Partners Channel	16
Schools Channel.....	18
Common Origination and Disbursement (COD).....	18
Students Channel.....	19
CDS Simplification	19
FAFSA on the Web Redesign.....	20
CRM Call Center.....	21
Organization Transformation	22
Program Management Office.....	23
Implementation Excellence	23
Partner Management.....	24
Program Planning & Reporting.....	25
APPENDIX: DELIVERABLES LOG.....	26
APPENDIX: MODERNIZATION PROGRAM SCORECARDS.....	27

INTRODUCTION

This Management Services Summary is being produced as a deliverable of the SFA Modernization Partner Program Management Office Task Order. This report covers the month of August 2000 and includes information on the overall status of Program deliverables, a summary of key Program Risks and Issues by area, achievements for the month, planned work for the next month, and performance of the Program initiatives.

The format and content of this report are based on the guidelines provided in the Program Management Task Order, standard project status reporting techniques, and input from SFA management personnel. The purpose of this report is to provide SFA senior management with information related to the performance of the SFA Modernization Partner Program team.

These monthly summaries will be refined to improve their usefulness and the value they provide. Please address any suggestions regarding the content or format of these reports to the SFA Modernization Partner Program Office Manager (elisabeth.s.schmidt@ac.com or 202-651-3640).

PROGRAM OVERVIEW

DELIVERABLES

The SFA Modernization Partner team delivered these contract deliverables during the month of August:

CFO

Product Test Build is the version of software that will be product tested. It includes all extensions, data conversion, application configuration and program-specific features for Oracle's AP, AR, FA, and GL applications. The Monthly Status Report for July outlines progress to-date, issues facing the team, and expected work during August.

CIO

Release 2.0 Intranet Content Design is a matrix that contains content information by channel and office. The deliverable also includes the graphical design of the sites for Students, Schools, Financial Partners, CFO, SFA University, Ombudsman, Analysis, Human Resources, and Contracting and Acquisitions.

Release Content Population 300 pages contains 300 pages of web content formatted for the Web. These pages are located on the intranet.

Content Preparation Standards focuses on the client-side activities of the content management process. It outlines how content is transported during the publishing lifecycle. An overall process flow as well as process flows for the various subtasks were developed to provide a guide for how content moves from an idea to the intranet staging area. The tasks will focus on the user's modification of existing content or the creation of new content leading to the upload of content to the designated staging area. The deliverable includes standards for style, accessibility and usability.

Content Management Process Design is a deliverable that contains a high-level process design flow that defines the roles and responsibilities to support intranet content management. The process flow will allow non-technical users to be contributors of content to the SFA Intranet.

Prototype IFAP Application is a detailed operational version of the application prior to full testing cycles. The deliverable includes a review of the working prototype to support user QA sign-off on business requirements functionality. The prototype is available on the Internet at <http://nmgprod1.edge-technologies.com/projects/sfa/beta1/IFAPdemo/index.htm> This is an electronic deliverable.

Integrated Technical Architecture Organization is a deliverable that identifies required roles, skills, and resources to develop and manage the Integrated Technical Architecture. The deliverable also provides descriptions for required roles and maps the roles to resources for development, execution and support of the Integrated Technical Architecture.

Security and Privacy Risk Assessment is a deliverable that provides a detailed security and privacy analysis, assessing the business processes, physical environment, application, and technology infrastructure of the existing and proposed environments, and recommendations for security and privacy solutions. This assessment reviewed the nine critical SFA systems identified by key personnel and evaluated their security and privacy vulnerabilities. Risk statements are offered for each assessment area overall and by system, with prioritized recommendations for improvements.

Security and Privacy Communication Plan is a brief, detailed document that will be used to help educate SFA personnel in information security and privacy. Because different levels of awareness are needed for different areas of SFA's environment, a framework was developed to identify needs, messages, delivery vehicles, and feedback mechanisms.

Monthly Security Program Report is a brief but comprehensive report documenting the activities of the Security team during the most recent period. It includes the support functions performed during the most recent period.

Enterprise Conceptual Logical Data Model, Version I is a high-level conceptual model of the target decision support system using deliverable 12.1 IFAP Conversion/Schools Portal as input. This deliverable should be considered version 1, in which not all aspects will be completely defined, but will evolve as users' needs evolve.

NSLDS Cost Analysis is an analysis of the various cost components related to the operation of the NSLDS system. It identifies cost savings opportunities related to NSLDS. This deliverable also includes a review of the current proposed enhancements to NSLDS and makes recommendations on those enhancements. This deliverable is considered a "living" document and will be updated as more requirements are identified and clarified. This information will be used to develop a conceptual data model and to begin the planning process for an enterprise data warehouse.

NSLDS Technical Architecture Analysis is an analysis of the NSLDS technical infrastructure components, architecture design, and overall processes, usership and usage. It also analyzes data sources and interfaces.

Financial Partners Channel

Business Case is a deliverable that documents a business case for each of the selected reengineering options with financial and non-financial costs and benefits.

Default Reduction Management Report is a deliverable that presents recommendations and incentives for reducing debt among lenders and guarantors, including best practices around debt collections.

Risk Modeling Conceptual Design is a deliverable that outlines a conceptual design for the risk modeling function, drawing from best practices on risk modeling and risk profiling in the financial services community.

Requirements Matrix contains a technical design for the three platforms within Financial Partners and the associated technical requirements.

Financial Partners Modernization Services Final Summary is the final report for Task Order 23 that provides a clear executive-level status of the FP Modernization effort associated with this task order. The deliverable documents the key activities, tasks planned and completed, and the results/outcome of the work performed.

Schools Channel

COD Preferred Solution Selection Workplan is a detailed workplan that describes the specific approach to identifying a preferred solution for full implementation of COD processes.

April 2000 Status Report includes a summary of School Portal activity that culminated in the production of Business Requirements for Version 1.0.

COD Mid-Level "To Be" Functional Requirements is a requirements document that adds another level of detail to the COD functional requirements. This document builds on previous COD deliverables that outlined the COD high-level "To Be" functional requirements.

School Implementation Challenges Summary is a document that identifies the major challenges schools will need to address in order to successfully implement the COD process.

COD Performance Model (COD "To Be" Business Performance Model) is a document that outlines performance targets and indicators for COD. The model contains the definitions of metrics as well as the methods of measurement, presentation, and communication that monitor the performance of each business capability during implementation.

Students Channel

Quick Hits Recommendation is a document that identifies three Quick Hits: warm voice handoffs (call transfers), a common reference guide, and Spanish Capabilities. It also includes Quick Hits recommendations and selection criteria with justifications / actions for early opportunities.

Call Center Inventory is a compilation of the SFA Call Center Sites, activities, and business processes. It also includes a detailed inventory on metrics, technologies, infrastructure and customer segments currently being served.

Loan Servicing Detailed Design and **Loan Origination Detailed Design** are milestones that consist of the details for the retirement of CDS based on the Conceptual Design document and Business Case.

Organization Transformation

Working Session Summaries provides a summary of the Working Sessions held with the SFA HR Director and appropriate HR stakeholders. Working Session Summaries reflect the discussion and decision points, issues and action items discussed in working sessions for the period August 1, 2000 – August 31, 2000.

SFA HR Modernization Plan and Implementation Strategy (short term) is a plan that includes the Human Resources Organization Design Concept and Operating Model, SFA Human Resources Office of Management Package, and key Position Descriptions.

HR Modernization Communications is a compilation of materials communicating the intent, progress and potential impacts of HR Modernization. The Communications Package included the following: an InStep article introducing the new SFA HR Director to SFA; an Employee Development Lifecycle process description used in discussions with SFA University; an SFA HR Activity Account describing the future roles of SFA Human Resources relative to the Department of Education's Human Resources Group; a Competency Catalog Education document used in working sessions with SFA leadership teams; and a document describing various on-line options for SFA's Performance Development Process.

Monthly Implementation Report is a report that highlights key accomplishments, implementation materials, and implementation plans developed during each associated month.

Updated Capability Release Plan (Modernization Sequencing Plan) Version 2 provides an update to the Capability Release Plan by incorporating new SFA leadership input and re-sequencing projects and initiatives in alignment with the proposed FY01 investment portfolio.

Production and Production Support for Updated Modernization Blueprint is a deliverable that outlines the production and production support necessary to release an updated Modernization Blueprint.

Annual Performance Plan Approach and Workplan define the approach and workplan for conducting the FY01 annual planning process to merge with other planning activities already under way (e.g., FY01 portfolio planning and business cases, Modernization Blueprint update, Products and Services Release Plan, etc.).

Overview and Final Presentation of Planning Approach provides a high-level annual performance plan to be conducted for FY01 (to merge with other activities already underway at SFA). It includes the proposed timeframe and milestones which align with required Federal planning deadlines and comply with associated legislative requirements and guidelines.

Primer for SFA FY01-FY02 Performance Plan provides detailed workplans for developing the SFA FY01-02 annual performance goals, measures, and linkages. The document also provides a guide for content, content owners, and the timeframe for completing the plan.

VALUE POINTS

CFO

- Participated in the NCHELP CFO Conference Demonstration with Financial Partners and NSLDS staff in Mystic, Connecticut. Delivered a presentation of the new web-enabled Forms 2000 to Guaranty Agency CFOs on Wednesday, August 2.
- Filmed a training video to expedite the training process by reaching a larger audience faster.
- Conducted a demo of the SFA FMS Oracle Financials for two of Congressman Hoekstra's staff.

CIO

- Facilitated the successful installation and testing of the VPN solution to obtain access to the VDC from the Aerospace location.
- Facilitated preparation and baseline of the browser lab at the Andersen Consulting Solution Center for testing of the School Portal and IFAP applications. The browser lab will allow for testing using multiple browser products and versions. By using the browser lab, testing is more thorough and there is a cost savings associated with reduced set-up of the testing environment.

Financial Partners Channel

- Facilitated the FY01 Strategic Planning Session for the FP Leadership Team on August 23 to develop the framework for on-going and new projects.

Students Channel

- Prepared Summary Students Channel project timeline graph with associated budgets for FY01.
- Prepared CRM / Call Center Overview presentations for Leadership meeting.
- Performed Mid-Point review sessions with sponsors and stakeholders to inform on IPT status, accomplishments and challenges.
- Assisted the San Francisco regional Debt Collections office in creating a mission statement and action plans.
- Conducted focus group meetings with stakeholders and students from NOVA, and a business requirements meeting with the core team to gather requirements for the redesigned site.
- Conducted a Technical Architecture Discovery meeting to understand the current architecture and potential changes, a User Experience meeting and creative workshop to determine the characteristics of the primary users, identify their basic needs, and discuss the tone of the redesigned site.
- Met with EDexpress to discuss potentially common functionality between the redesigned site and EDexpress.

Organization Transformation

- Consulted eHuman Resources experts to identify an appropriate e-enabled Performance Appraisal system and HRIS options.
- Arranged demonstrations and discussion opportunities with various vendors.

Master Deliverables Schedule

The attached Gantt charts (08.1.1e_Monthly Master Deliverables Schedule – Accepted_083100.mpp, 08.1.1e_Monthly Master Deliverables Schedule – Delivered_083100.mpp, and 08.1.1e_Monthly Master Deliverables Schedule - In Progress_083100.mpp) provide a graphical representation of the status of the deliverables for the SFA Modernization Partner Program that are in progress, have been delivered or accepted during the month of August.

Summary Of Program Risks & Issues

Program Risks

AREA	DESCRIPTION	MITIGATION STRATEGY	ABILITY TO CONTROL
HIGH SEVERITY			
School Portal, IFAP, Data Warehouse and Intranet	The CIO management team has reviewed architecture platforms and has recommended changes. Possible changes to the architecture platform have resulted in a 2 week slip in critical hardware delivery that has impacted go-live dates for production.	<ul style="list-style-type: none"> • Work with the VDC and IT Services to accelerate hardware readiness. • Request involvement from Mod Partner in future discussions involving architecture platform changes. • Revise the implementation schedules to compress schedules and reassign resources. 	Low
Intranet and Content Management	The schedule date for completing the conversion of the Intranet to the new standard architecture have been delayed due to the redeployment of resources to expedite the go live date for production of IFAP School Portal.	Revise the schedule dates to reflect the resource shifts.	Medium
Operations	There is an aggressive schedule to implement operations for IFAP School Portal, Technical Architecture Infrastructure and Data Warehouse.	Perform an accelerated review with the sponsor of each application in order to create a recommendation to support each application.	Medium
Operations	Task Order 34 and Task Order 22 need to be awarded. The schedule dates are impacted.	Work with SFA to get approval. Verbal approval was received but the task order has not been awarded.	Low
FMS Oracle Financials	New members of the FMS team are unable to access EDLAN. The Average time to provide access is six weeks.	Work with SFA CIO IT to determine how the process could be expedited.	Medium

Program Issues

HIGH SEVERITY		
AREA	ISSUE	PROPOSED SOLUTION
CDS	The development team for the delinquency report needs access to the development environment in the VDC to test data loaded on the development environment. However data has not been loaded into the new environment.	Expedite the process for granting the team access to the environment and ensure data is loaded into the new environment.
Enterprise Architecture	TeamSite server does not support Server Side Includes (SSI) with the installation of IBM HTTP server. There is an inability to use SSI which impacts the application development structure.	Assess the impact of not having SSI's, and the impact of developing a new parser.
MEDIUM SEVERITY		
AREA	ISSUE	PROPOSED SOLUTION
Common Orig. and Disbursement (COD)	Slippage in deliverable dates for 19.1.02 Vendor Visit Status Report and 19.10.3 Preferred Solution Selection.	Several vendor visits had to be re-scheduled based on unavailability of key SFA attendees. These reschedulings have created a minimum slippage of two weeks in two deliverables: Vendor Visit Status Report and Preferred Solution Selection. In addition, this will impact remaining deliverables and overall timeframe by a minimum of two weeks. Proposed solution is to have Mary Haldane, COD lead for SFA, approve moving due dates for Vendor Visit Status Report and Preferred Solution Selection out 3 weeks from 8/31/00 to 9/21/00 and 10/5/00, respectively. Mary will then send Carol Seifert an email confirming this change.
IFAP	The frame relay line at Beacon is not working. Connectivity to the VDC for support is needed. Without the frame relay line, testing and deployment efforts could be impacted.	The VPN solution for Exolve and the Frame Relay connection to Beacon will be tested. Work with SFA to expedite the MCI service request for the frame relay line to Beacon.

KEY ACCOMPLISHMENTS THIS MONTH AND PLANS FOR NEXT MONTH

During the month, the project teams accomplished the following:

CFO

FMS Oracle Financials

Work Completed this Month:

- Delivered 14.1.3 Product Test Build.
- Identified a strategy and approach for Phase III, and completed an initial Phase III work plan, focusing on current business baseline and requirements activities through 10/31/2000.
- Finalized the draft Capacity Planning document.
- Met with ED CFO on process flows for "To Be" LEAPP / GAPS system interfaces.
- Successfully completed Assembly Testing.
- Finalized Product Test Plan.
- Finalized Operational Readiness Test Plan.
- Met with functional experts to recommend FMS user roles and system responsibilities.
- Validated training audience segmentation, training requirements, and Oracle OOB (out of the box) training.
- Completed the Conversion document.

Planned Work in Progress:

- Continue revising content of the Memorandum of Understanding and Service Level Agreement.
- Continue gathering materials for development of operational readiness test cases/scripts/cycles.
- Continue product test case development and execution.

Work Projected for next Month:

- Document current business baseline and requirements activities for remaining programs for FMS Phase III.
- Continue drafting content of Memorandum of Understanding.
- Complete conversion scripts.

CIO

Work Completed this Month:

- Ombudsman – The work associated with the cleanup of the Seibel environment progressed well. Completed and tested Intake Scripts and tested the Assignment Manager module.
- Security - The A130 Risk Assessments of all current SFA systems were completed and the first compilation was delivered for SFA Security Champion review. This will provide a baseline for SFA security audit responses in the future. Also, the communications plan for educating and informing the SFA organization on Security and Privacy was completed and is under review for implementation.
- Operations - The operations model for Modernized applications has been completed and reviewed with many of the SFA management team members. The Operations Transition team is in place, working with the current applications being developed for deployment (Intranet, FMS, School Portal, IFAP and technical infrastructure), to develop the operations team and funding estimate for each application. This work is developing a structure to realize efficiencies of shared technical resources to be used across applications.
- Integrated Technical Architecture Plan - Completed the “As Is” and the “To Be” information portfolios for the Integrated Technical Architecture (ITA) Framework. We also completed the draft of Technology Policies and Procedures guide for review within the CIO prior to engaging the business units for their review and comment.
- Enterprise Architecture – Completed the migration of the Schools Portal and IFAP application code from the interim Loaner boxes at the development sites to the VDC development environment.
- Data Warehouse – Presented the NSLDS findings presentation to the General Managers. The Data Warehouse Implementation Plan and Business Case will be developed as a follow-on to this meeting.
- IT Management Support - Solved VPN connectivity problems to support developers with access to servers at the VDC.

Planned Work In Progress:

- Ombudsman – Continuing to develop User Procedures which will be used to develop end user training.
- Security – Developing a Security Awareness schedule and a Training Workshop for SFA Security Managers.
- Operations – Finalizing the production readiness criteria for applications with the VDC.
- Enterprise Architecture – Continuing to build out the architecture platforms at the VDC for the Internet, Data Warehouse and EAI environments. The focus and priority is for Internet to support IFAP/School Portal and then Data Warehouse to support CDS Retirement and CFO Data mart, followed by Enterprise Application Integration.
- Data Warehouse – Continue NSLDS planning activities to propose the appropriate sequencing plan and CFO Data Mart development.
- Intranet Release 2.0 – Customizing Autonomy search engine for SFA Intranet end users based on functional requirements. Developing an integration and testing plan.
- Content Management – Develop Interwoven product workflow configuration files, and a component test plan for the customized portions of the software.

Work Projected for next Month:

- Ombudsman - Finalize the Ombudsman recovery plan to identify new delivery dates and training schedules.
- Operations – Finalize the Help Desk strategy as it aligns with the SFA seat management approach, and complete operations support plans for School Portal, IFAP, Tech Infrastructure, Data Warehouse and Ombudsman.
- Integrated Technical Architecture Plan – Complete the SFA Technology Policy and Standards Guide.
- Enterprise Architecture - Begin Production environment build. Complete testing and maintaining connectivity to the production environment at the VDC.
- Data Warehouse – Complete CFO Task Order 39 and Task Order 21 revisions to reflect the Implementation Plan and Business Case. Continue CFO, DLM (Delinquent Loans Mart) and NSLDS development activities.
- School Portal – Continue component and system testing, and migration to the VDC.
- IFAP – Continue component and system testing, and migration to the VDC. Complete the configuration management plan and confirm integration with overall Configuration Management needs at SFA.
- Intranet Release 2.0 – Complete integration testing, end-user acceptance testing, and testing procedures for Autonomy application. Complete the business strategy for SFA Intranet and SFA Intranet end users.
- Content Management – Complete test templates for the IFAP application and create Open Deploy and Data Deploy configuration files to deploy the content in the various repositories.
- IT Management Support - Finalize the Configuration Management (CM) Plan for IFAP and School Portal. Revise and complete CM process per new scope.

Financial Partners Channel

Work Completed this Month:

- FP Project Management and Facilitation – Finalized workplans for the Analysis and Design Phase. Coordinated the development of the FPT Analysis and Design Plan.
- FP Employee Development / Organization Transformation – Determined that the GA/Lender website will be the appropriate vehicle for posting transformation communications to the community (external audiences). Received compiled results of a total of 58 Organizational Assessments for a 70% response rate. Attended the SFA Communication Meeting in an effort to collect both internal and external communications with other channels. Completed the first draft of the Transition Plan. Completed an Action Plan for the Employee Development Implementation Phase.
- FP Core Process Reengineering – Attended a meeting hosted by the Technical Oversight workgroup to observe current processes in support of GA and Lender reviews. Finalized the current to-be process flows for the GA and Lender payment processing. Also completed “To Be” process flow for the GA payment processing. Distributed checkpoint verification process flows to the GA/Lender Payment group for review and distributed the reengineering review process flows for comments. Distributed a complete draft of business case to the Lender and GA Payments workgroup and Oversight and Technical Assistance workgroup on 8/17 with a one-week comment period.
- Technical Support - Finished collecting detailed requirements for data warehousing in support of phase 1. Completed the draft of the Requirements deliverable for Document Management, Data Warehouse, and Middleware.
- Risk Modeling – Submitted and revised the draft Risk Model conceptual design. Submitted the draft Risk Model summary for review. Created Modeling Conceptual Design draft document, based on review comments. Submitted the final draft of Risk Model Conceptual Design Document and prototypes for review and approval.
- Default Reduction - Analyzed performance benchmarks within the industry and student loan sector for cost benefit analysis. Completed an internal project analysis of the default reduction options.

Planned Work In Progress:

- FP Project Management and Facilitation – Beginning development of the Program Management Plan Final deliverable.
- FP Employee Development / Organization Transformation – Developing the Transition Plan. Planning next release of internal communications. Continuing work on communication vehicles for external audiences. Posting one-page communications to GA/Lender website. Incorporating Regional Directors’ feedback into the Employee Development Plan.
- FP Core Process Reengineering – Working with the Technical Oversight workgroup to review current GA and lender review procedures. Continuing to develop the “To Be” process for the Automated Checkpoint process and develop cost/benefit analyses for the Checkpoint and the Streamline Review Process recommendations. Meet with GA/Lender Payment workgroup to review Lender and GA process flows and checkpoint verification flows. Distributing the draft business case to the GA/Lender Payment and Oversight and Technical Assistance workgroups for review and comment.
- Technical Support – All planned work was completed.

- Risk Modeling – Gathering data for performance management indicators and benchmarks for the risk model.
- Default Reduction – All planned work was completed.

Work Projected for next Month:

- FP Project Management and Facilitation – Finalize the Program Management Plan deliverable.
- FP Employee Development / Organization Transformation – Plan the next release of internal communications. Complete the final draft of the Transition Plan.
- FP Core Process Reengineering – Incorporate changes into the business case to finalize the business case submitted on 8/31 for review and receive sign-off.
- Technical Support - Complete and receive sign-off on the Document Management, Data Warehouse, and Middleware deliverables. Distribute the Requirements deliverable that covers Data Warehousing, Document Management, and Middleware.
- Risk Modeling – Evaluate the costs and benefits of the Risk Modeling options, including software options.

Schools Channel

Common Origination and Disbursement (COD)

Work Completed this Month:

- Delivered 19.1.1 COD Preferred Solution Selection Workplan, and 19.2.1a April 2000 Status Report (Portals). Delivered and received final approval for 19.1.4 COD Mid-Level “To-Be” Functional Requirements, 19.1.5 Schools Implementation Challenges Summary, and 19.1.6 SFA COD Performance Model.
- Completed mid level “to-be” process hierarchy and descriptions and documented models in CASEwise.
- Met with Title IV Delivery managers, Case Management and Oversight managers, and the Direct Loan School Relations manager to determine communications needs for conveying the COD concept to SFA personnel.
- Identified SFA volunteers for the Schools COD Transition Management team.
- Determined scope and strategic course of action to recruit schools to participate in the COD Pilot.
- Determined scope and strategic course of action for the Community Outreach approach.
- Attended the following site visits to evaluate potential solution/alliance partners:
 - ACS on 8/24/00 in Rockville, Maryland
 - EDS on 8/28/00 in Montgomery, Alabama
 - Total Systems on 8/29/00 in Columbus, Georgia
 - AFSA Data Corporation on 8/31/00 in Long Beach, California

Planned Work in Progress:

- Establish and kick off Schools COD Transition Team.
- Complete draft of the COD communication plan for Transition Team.

Work Projected for next Month:

- Schedule and attend site visit for USA Group in Indianapolis, Indiana.
- Complete and deliver 19.1.2 Vendor Visit Status report.
- Follow-up with customer references provided by potential solution/alliance partners and gather information from SFA Business Managers on their experience dealing with potential solution/alliance partners..
- Where applicable, gather information on past performance of potential solution/alliance partners based on previous contracted work with the Department of Education.
- Complete and deliver 19.1.3 Preferred Solution Selection recommendation.
- Develop 19.1.7 Implementation Plan.
- Develop 19.1.8 Phased-In School Participation Approach.
- Develop 19.1.11 Summary of Community Outreach, Support, and Feedback.

Students Channel

CDS Simplification

Work Completed this Month:

- Finalized the Loan Origination and Loan Consolidation Detailed Design Documents with Dan Hayward and Denise Lefieste. Potential revisions to the designs may occur in the future.
- Developed/refined System Integration Testing/System Application Testing test conditions and data.
- Met with Dan Hayward to discuss Status and Issues for DLSS Changes.
- Submitted request for data to be transferred to the development data warehouse environment in the VDC to test delinquency report application.

Planned Work in Progress:

- Continue System Integration Testing for DLSS changes.
- Develop Integration Testing Model for Loan Origination changes.
- Implement code changes to Loan Consolidation System design document.
- Continue the development of the Delinquency Report on Data Warehouse.

Work Projected for next Month:

- Begin Implementation Planning Process.
- Complete System Integration Testing for DLSS changes.
- Continue System Integration Testing for Loan Origination changes.
- Complete Loan Consolidation Development.
- Test Data warehouse changes.
- Begin Inter-system Testing with Loan Origination.

FAFSA on the Web Redesign

Work Completed this Month:

- Further defined workplan for the current phase and created a draft workplan for subsequent phases of release 6 that lists the major deliverables that should come out of the phase and target completion dates for each deliverable.
- Completed a Vision Document that describes the purpose of the redesign effort, the stakeholders and their involvement, and the high level list of features that the redesigned web site will provide.
- Completed the Creative Brief which documents the basic creative design parameters for the redesigned web site, focusing on the needs of the primary users.
- Designed a Site Map that depicts the functional process flow of the redesigned site's functionality.
- Listed the high level features with middle level features in a matrix that will allow the project team to map use cases to each feature and assign a priority, target release, and level of difficulty.

Planned Work in Progress:

- Complete remaining Use Cases.
- Complete Initial High Level Business Case and Project Plan.
- Complete User Needs Assessment Matrix.
- Complete agenda, process roadmap, and charter for the IPT expansion.

Work Projected for next Month:

- Conduct Intense User Interviews with Students and Financial Aid Administrations.
- Begin Detailed Requirements and High Level Design Phase.
- Create Detailed System Level Use Cases.
- Develop Platform and Hardware requirements.

CRM Call Center

Work Completed this Month:

- Delivered 15.1.1 Quick Hits Recommendation for acceptance.
- Drafted, reviewed and approved the content of the Best Practices, Current State, and Referral Guide documents with the core team.
- Conducted Gap Festival to identify and categorize key Gaps with stakeholders. The Gap Festival brought together approximately 30 stakeholders from across the SFA channels and Call Center operating partners to determine the areas of focus for CRM improvements.
- Participated in site visits to the FAFSA processing center in Mt. Vernon, IL and the NCS Call Centers in Iowa City, IA.
- Performed a Mid-Course Review with stakeholders and sponsors to summarize the work completed by the IPT sub-teams. The session summarized the work completed by the Best In Business and Current State Analysis sub teams and outlined how the information would be used to complete the IPT goals.
- Enrolled all of the participants for the Gap Analysis team and finalized the process for the team to complete its goals.

Planned Work in Progress:

- Complete Best Practices site visits and presentations.
- Assist centers in the changes to the Spanish Option IVRU modifications.
- Develop an action plan for executing call transfers once the MCI cut-overs are completed.
- Monitor the progress of the FTS-2001 cut-over with MCI at the Call Centers.
- Organize the Gap Analysis process and deliverable content.
- Compile documentation for the work done to date by each sub-team.
- Develop the process for completing the Solutions Generation and Recommendation phase of work.

Work Projected for next Month:

- Complete Gap Analysis – identify Gaps and prioritize strategic issues. Analyze and document all gaps and possible solutions. Complete deliverable.
- Solution Generation and Recommendation – Develop a detailed list of recommended alternatives and business cases for chosen solutions. Complete deliverable.
- Plan for Solutions Selection phase.

Organization Transformation

Work Completed this Month:

- Delivered 30.1.2a Working Session Summaries, 30.1.3a SFA HR Modernization Plan and Implementation Strategy, 30.1.4a HR Modernization Communications and 30.1.6b Monthly Implementation Report.
- Researched performance development systems options and arranged/participated in demonstrations of performance development system vendors. A summary of demonstration and vendor capabilities was drafted and reviewed with the client. Based on vendor demonstrations, SFA selected Perform.com as the customizable web-based performance development tool to replace GPAS on October 1st.
- Developed proposed process model for the new Performance Development Process and drafted a Communications/Education Plan to implement this process.
- Developed a composite SFA Skill Catalog incorporating professional, managerial and functional skill comments from all organization units.
- Revised HR organization model and SFA Human Resources Office of Management Package based on detailed feedback from key stakeholders.
- Revised SFA HR Activity Account (Proposed Transition Plan) - for use in the Human Resources Group working session and for use by Greg Woods in meetings with Human Resources Group leadership.
- Confirmed Position Description series and process of developing Position Descriptions for remaining Human Resources positions with the client.
- Developed draft storyboard of long-term HR strategy.
- Began the development of a Human Resources Information System business case.

Planned Work in Progress:

- All planned work has been completed.

Work Projected for next Month:

- Define guiding principles for new Performance Development Process.
- Develop/Roll-Out the Performance Development Process communications/education materials as outlined in the Communication Plan.
- Customize Performance Development Process using the Perform.com system.
- Conduct user testing on Perform.com site.
- Compile, submit, review and finalize a draft of the Skill Catalog with key stakeholders and refine the Skill Catalog based on SFA's selection of a Proficiency scale.
- Assist in the approval process for the Human Resources Organization structure.
- Continue to refine the Human Resources Long-Term Plan and finalize the plan based on feedback from stakeholders and Subject Matter Experts.

Program Management Office

Implementation Excellence

Work Completed this Month:

- Finalized and submitted PBO Success Factors.
- Developed a prototype of Modernization Blueprint and delivered the prototype to an external review committee.

Planned Work in Progress:

- Gathering information and facilitating working sessions to update the Blueprint.
- Researching options for automating the production of the Integrated Sequencing Plan in conjunction with other PMO reports.
- Beginning discussions on how to align SFA's planning process with enterprise organization units.

Work Projected for next Month:

- Produce a draft of the Modernization Blueprint.
- Facilitate sessions with appropriate stakeholders regarding SFA planning alignment.
- Begin to define specific metrics for monitoring progress towards achieving the PBO Success Factors.

Partner Management

Work Completed this Month:

- Submitted 14 Task Order proposals:
 - TO 5 Mod 2 – Integrated Product Team/Aid Awareness – Phase III
 - TO 7 Mod 2 – Modernization Business Planning Support – Part III
 - TO 19 – COD Phase II
 - TO 19 R1 – COD Phase II
 - TO 20 R1 – CFO Transformation
 - TO 22 – CIO IT Development and Management
 - TO 30 R1 – SFA HR Modernization Support
 - TO 30 R2 – SFA HR Modernization Support
 - TO 31 – SFA Front-to-Back Training Coordination
 - TO 33 – FAFSA on the Web Redesign
 - TO 33 R1 – FAFSA on the Web Redesign
 - TO 39 – CFO Data Mart
- Completed Security documentation on 44 individuals.
- Awarded 3 Subcontracts.
- Completed move of Modernization Partner Team (except FMS Team) to new site (901 D St, SW).

Planned Work in Progress:

- Continuing to support the development of performance based SOWs for future contracts/modifications (CBMD, NSLDS, PEPS, FFEL).
- Continuing updates to the Legacy Contracts Transition Plan.
- Continuing effort to complete in progress Task Order proposals.
- Continuing effort to have each Modernization Partner staff member execute a Notice of Criminal Liability under the Privacy Act statement and an OF-306 Declaration for Federal Employment form – 243 of 250 complete.
- Continuing negotiation efforts with subcontractors - 19 signed, 11 in final stages, 7 in progress.
- Completing planning efforts for move of FMS Team to new site (901 D St, SW).

Work Projected for next Month:

- Continue to support to the development of performance based SOWs.
- Continue to update the Legacy Contracts Transition Plan.
- Submit remainder of in progress Task Order proposals.
- Continue effort to have each Modernization Partner staff member execute a Notice of Criminal Liability under the Privacy Act statement and an OF-306 Declaration for Federal Employment form.
- Continue negotiation efforts with subcontractors.
- Initiate update to the Contract and Acquisition Management Section of the Modernization Blueprint (include a summary of the Legacy Contract Transition Plan).
- Initiate an analysis of achieved VDC savings.

Program Planning & Reporting

Work Completed this Month:

- Achieved 100% CMM Level 2 compliance for the PMO.
- Continued conducting weekly Pulse point meetings.
- Continued producing bi-weekly scorecards.
- Continued producing consolidated weekly program status report.
- Continued producing integrated Modernization Partner/CIO status report.
- Began pilot of new workplanning requirements with the COD team.

Planned Work in Progress:

- All planned work for the month was completed.

Work Projected for next Month:

- Develop plan for the PMO to achieve CMM Level 3 compliance.
- Continue conducting weekly Pulse point meetings.
- Continue producing bi-weekly scorecards.
- Continue producing consolidated weekly program status report.
- Continue producing integrated Modernization Partner/CIO status report.
- Monitor COD workplan requirements pilot and implement enhancements.
- Implement feedback regarding Baseline Modernization Partner Procurement Plan and begin tracking performance against the plan.
- Deliver 8.1.4b Baseline Modernization Partner Procurement Plan.
- Provide monthly updates to the Modernization Partner Procurement Plan and report on procurement milestones and metrics.

APPENDIX: DELIVERABLES LOG

Attached is a deliverables log (08.1.1e_Monthly Deliverables Matrix_083100.xls) which indicates the status of all contract deliverables as of 8/31/00. The deliverables are separated as Deliverables In Progress, Deliverables that have been Delivered, and Deliverables Accepted during the Past Two Months.

APPENDIX: MODERNIZATION PROGRAM SCORECARDS

The attached scorecards (08.1.1e_Monthly Scorecards_083100.xls) provide a summary status of key program management areas. The Modernization Program Summary Scorecard is an aggregate assessment of program performance. The scorecard was developed by conducting an assessment of individual projects within the SFA Modernization Partner Program. The assessment criteria precedes the scorecards.